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GAIN Report

Global Agricultural Information Network

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Morocco

Exporter Guide

2011

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Report Highlights:

This Exporter Guide Report provides an update of all sections, including the political and economic situation, agricultural trade data and local business and government contacts.

SECTION I: MARKET OVERVIEW

Current Political and Economic Situation

Morocco continues to engage in a process of democratization and political reform that started with the change of its constitution in July 2011. In November 25, the country had the first parliamentary elections that will give an elected government some of the authorities that were previously reserved for the ruling monarch King Mohamed VI. As a result of the elections, the moderate Islamist party Justice and Development Party (PJD) won 107 of 395 parliament seats and has been given a mandate from the king to form the new government. The PJD ran its campaign on a social platform aimed at achieving better governance, social justice, and fighting corruption, while improving the country's economic performance. Although the new government has not been formed, yet there are positive signals that it will continue Morocco's path towards economic reform and adhering to its international commitments and trade agreements.

The Morocco-US FTA was implemented in January 1, 2006. The agreement allowed the United States to recapture a significant market share in many traditionally traded commodities and to export, for the first time, many other commodities which were limited by high import duties. According to Moroccan import data, U.S. exports to Morocco soared to \$906 million in 2007 sustained by a weak dollar and adequate supply from the United States. According to U.S. trade data, agricultural and food exports from the U.S. to Morocco in 2010 were estimated at \$766 million, while Morocco official data put imports for that year at \$847 million.

Table 1: United States Exports to Morocco (value \$1000)

| Product | 2008 | 2009 | 2010 | Jan - Oct 2010 | Jan - Oct 2011 | P/P % Change |
|-------------------------|---------|---------|---------|----------------|----------------|--------------|
| Intermediate Total | 239,401 | 259,946 | 426,164 | 354,127 | 561,807 | 59 |
| Bulk Total | 198,722 | 213,348 | 261,674 | 215,279 | 206,403 | -4 |
| Consumer Oriented Total | 86,037 | 31,490 | 76,644 | 60,622 | 56,483 | -7 |
| Forest Products | 940 | 958 | 1,106 | 948 | 1,958 | 107 |
| | | | | | | |
| Agricultural Products | 524,159 | 504,783 | 764,482 | 630,028 | 824,693 | 31 |
| | | | | | | |
| Ag, Fish & Forest Prods | 525,263 | 505,814 | 765,628 | 630,983 | 826,789 | 31 |

SOURCE: USDA/GATS

During the period January-October 2011, U.S. exports soared to \$827 million, an increase of 31 percent compared to exports during the same period of 2010.

Although import duties imposed by Morocco are generally high, as the FTA agreement entered its sixth year of implementation on January 1, 2011, the cuts in duties for U.S. origin products will be more significant and should provide U.S. exporters with greater opportunities to export their products to this market.

Morocco's economic growth fluctuates heavily with agricultural output, which is largely determined by rainfall. About 90 percent of Moroccan agriculture depends more or less on rainfall. In the past, growth has varied from 11 percent to minus 1 percent largely because of the lack of rainfall. According to the Ministry of Agriculture, the Moroccan grain harvest for 2010/2011 reached 8.36 MMT, up 12 percent compared to the 2009/2010 harvest of 7.46 MMT, but up 25 percent compared to the last 5 year average of 6.7 MMT.

Morocco's soft wheat production is estimated at 4.17 million tons, up 28.4 percent from the previous year, while durum wheat production is estimated at 1.85 million tons, 12.8 percent higher than the previous crop. To protect local producers from foreign competition, the Government of Morocco set a 135 percent import duty on common wheat that was later suspended, effective November 15 until December 31, 2011. Similarly, an 80 percent import duty on durum wheat was also suspended, effective October 1 until the end of December 2011. The suspension of import duties is intended to offset the increase in wheat prices in the international market.

In April 2008, the Ministry of Agriculture announced its new strategy for agricultural development in Morocco. Now in its fourth year of implementation, the strategy has been successful in increasing the overall agriculture production level by 38 percent. The "Green Morocco Plan" strategy calls for reform of water policy, food standards, marketing, etc., and has two main components:

Pillar I

- Attract investments by making about 50,000 hectares of land available to investors each year in order to overcome the land tenure catch-22 situation. The example of the state farms recently leased to the private sector that successfully attracted considerable investments, created jobs, and introduced new farming techniques to Morocco's rural area has probably been taken as a model.

Pillar II

- Encourage aggregation of small farmers into integrated, viable entities.

Morocco has been liberalizing its economy and trade. Prices of virtually all consumer-oriented products are market determined. There is little government involvement in imports and processing of food products, especially consumer-oriented products. The sugar processing industry is where the GOM is involved the most, although all sugar beet and cane mills are scheduled to be privatized. The

GOM completely phased out the subsidy for vegetable oil but it is still heavily subsidizing sugar and some wheat flour at the retail level to make them accessible to the low-income population.

Banking System:

The banking system is well developed and most banks are private and have correspondent banks in Europe and in the United States. Foreign currencies are readily available to importers upon presentation of appropriate import documents. Although the use of Letters of Credit is common, many importers prefer to shift to use of payments against documents after the first few operations. The current regulation authorizes up to 40 percent of the FOB value as advance payments for import operations but most regular importers don't want to take this risk.

Morocco's foreign exchange reserve has been rapidly depleted this year, due to huge import bills and reduced revenue sources. In October 2011, the Morocco's foreign reserve had sufficient funds to cover only 5 months of the country's imports, compared to the normal level of covering seven months of imports.

Key Demographic Development:

Morocco's population is estimated at about 34 million, of which about half live in the rural areas. The population grows at about 1.5 percent and an estimated 55 percent of the population is less than 25 years old. The middle class is steadily increasing and the family size is becoming smaller (average of 3-4 children). The illiteracy rate is about 40% and is much higher in the rural areas. Islam is the prevailing religion (over 97%). Arabic is the prevailing language and while Moroccans understand classical Arabic, they use mostly the local dialect that classical Arabic speakers may find hard to understand. French is the most widely used business language.

For the most part, Moroccan home cooking remains traditional, but change is coming, especially in large cities where there is a tendency for young families to adopt a western lifestyle. The number of women working outside the home is steadily increasing, which results in higher income for the family but also forces its members, when they can afford it, to turn to ready-for-use or semi-processed products instead of traditional, time-consuming, homemade products. This is particularly true in large cities such as Casablanca, Rabat, Marrakech, Fes, Agadir, and Tangier where distribution channels have significantly developed in recent years. Today, local producers and importers of consumer-oriented food products are able to deliver many new quality products to consumers in modern supermarkets.

Consumer Spending:

The bulk of the demand for consumer-oriented food products comes from large cities where the population with higher income and more modern lifestyle lives. It has been estimated that about 10 percent of the population (3 million) can afford to buy imported products and spend nearly 11 times more than the 10 percent of the population with the lowest income.

Eating habits for working Moroccans have changed since the establishment of a labor law in 2005 to change working hours (no mid-day break) for public and private sector institutions. Many of the working Moroccans who are not able return home for the mid-day meals now take their lunch at restaurants and fast food places. This has led to a significant increase in the number of restaurants and fast food outlets in Morocco in the past few years.

Table 2: Advantages and Challenges

| Advantages | Challenges |
|---|---|
| Morocco has a FTA with US. Some products have immediate preferential access. On the long term, duties for most products will be phased out. | Morocco has free trade agreement with an increasing number of countries including EU, Dubai, Turkey, and Arab countries. |
| Local production fluctuates widely with the weather, which makes Morocco dependent on imports. | Geographical disadvantage (Europe is a few miles from Morocco) resulting in high U.S. shipping cost. |
| Many high value food products are not known to the Moroccan consumer, which means there is room for many new products. | French continues to be the predominant business language. Moroccan importers traditionally do business through European brokers and traders. |
| The local food industry is upgrading and becoming more demanding on quality and regularity of supply. | Many products that are common in the United States are not known in Morocco. |
| Increasing middle class. Increasing number of women working outside the home. Modernizing lifestyle. | Limited purchasing power of the Moroccan population. An estimated 10 % of the population (3 million) is able to buy imported products regularly. |
| Fast developing modern distribution channels offering room to develop new branded products. | Traditional distribution networks are still predominant for many food products, especially in rural areas. |
| Western culture attracts youth. FAS/USDA offers free trade servicing to exporters visiting Morocco. | Because of the relatively high customs duties for many products, some of the benefit of the FTA will be tangible only in the medium and long terms. |
| American products are synonymous with quality in many cases. | Lack of knowledge about U.S. supplies, industry, standards, and grades. |

SECTION II: EXPORTER BUSINESS TIPS

- Most importers are located in Casablanca and imports by container are mostly done through the port of Casablanca.
- For food standards and regulations, including food labeling see the Attaché report: Food and Agricultural Imports Regulation and Standards Report (FAIRS) MO1111 at <http://www.fas.usda.gov/scripts/attacherep/default.asp>
- For export certificates required by Morocco please refer to MO1112 at <http://www.fas.usda.gov/scripts/attacherep/default.asp>
- In all major ports and airports, the Ministry of Agriculture has one-stop shops for importers to clear all kinds of imported agricultural products. The entity in charge is the DCQ (Direction du Contrôle de la Qualité) which is a regional representative of the National Office for Food Safety (ONSSA). To clear Customs, importers are required to present a sanitary certificate for all animal food and fresh fruit and vegetable products they import. A local laboratory analysis done by official laboratories may also be required to clear customs, especially for new and unfamiliar imported products.
- Often Moroccan importers are not familiar with products that are common in the United States. Also, many importers are not used to U.S. grades, standards, and U.S. appellations. Exporters are advised to provide pictures, brochures, or even samples to Moroccan importers. Many local importers require samples before making purchase commitments.
- Moroccans use only the metric system for measurement.
- Although an increasing number of Moroccan importers can communicate in English, French is still the predominant business language. Exporters with French capabilities or French written promotional materials will definitely have an advantage in communicating with importers.
- Imports and distribution of food and beverage products in Morocco are handled both by regular importers as well as importers who operate on an opportunity basis. Regular importers market their products through their own sales force (typically to hotels, supermarkets, wholesalers) and through independent well-established wholesalers (in case of small shops, restaurants). U.S. exporters interested in selling consumer-ready food or beverage products should find a local importer to access the retail market. Importers normally have in-depth knowledge of specific importing procedures.
- Telecommunications are generally adequate. Internet and email are available in most hotels and "Cyber Café" shops throughout Morocco. Phone calls from hotels can be excessively expensive but cell phone and reusable phone cards can be purchased locally at a very reasonable price.

- The holy month of Ramadan is not a holiday but business slows down significantly because Muslims fast during the day. Most restaurants close during this month, alcohol is not served and people are not allowed to smoke during the day. Exporters should avoid visits during Ramadan but if travel during this period is unavoidable exporters should concentrate their meetings in the morning. Surprisingly, consumption of some products (such as honey, sugar, butter, vegetable oil, dairy products, etc.) increases during Ramadan. In 2010, Ramadan started mid-August.

SECTION III: MARKET SECTOR STRUCTURE AND TRENDS

The limiting factor to the increase in demand for consumer-oriented products is the low income. U.S. exports of consumer products to Morocco registered a significant increase, reaching \$76.6 million in 2010. This was mostly due to lowering the import duties for some of these products under the U.S.-Morocco FTA.

Although the retail food outlets in Morocco continue to be dominated by a large number of small grocery stores (an estimated over 90 percent of stores are less than 225 square feet large), the number of supermarkets has been increasing considerably in recent years and more are under construction, especially in large cities. Today, in addition to the estimated 200 small self-service shops (2 registers, 1000 ft² - 3500 ft²) there are about 50 large supermarkets, of which 26 are large and comparable to large supermarkets in the United States. All supermarkets are privately owned and some have been opened by multinational chains or as a joint venture with Moroccan investors. Also, over the last few years a number of modern self-service retail outlets, including convenience stores, opened in major cities and this trend is likely to continue in the future.

Importers still play a major role in the introduction, marketing, and distribution of imported foods throughout the country. Except for the two largest supermarket chains that, in addition to buying from importers, have also been importing directly through their buying platforms in Europe, all supermarkets get their products either directly from importers or from wholesalers. It is not uncommon that importers are also wholesalers. Many importers prefer direct contact with suppliers as they feel that middlemen complicate transactions, lower profits, and could work with competitors. Most Moroccan importers like to buy on samples. Internet sales are virtually non-existent for food products.

Moroccans are regularly exposed to Western culture in their daily life, especially through television (an estimated 1 million TV satellite dishes). Thus, the steady Western influence on Moroccan lifestyles is expected to result in even higher demand for consumer-oriented products in the future.

U.S. exports of consumer-oriented products will continue to be dampened by the high freight costs and length of shipping time. The small size of the Moroccan market can be partly serviced through consolidated shipments from the United States, but it will continue to favor small shipments from

neighboring countries (Europe). However, this situation may improve in the coming years with the opening in 2009 of a direct shipping line between the Moroccan port of Tanger-Med and the port of Norfolk, VA in the U.S. East Coast.

The Moroccan food industry is dominated by a large number of small family enterprises that average less than 50 employees. The government still owns some food processing units such as sugar processing mills, and alcoholic beverage manufacturers. Moroccan processed food exports are mostly processed and canned fruits and vegetables, and processed fish, including canned fish.

High Value Products for Food Processing Sector:

The United States has a greater potential to export semi-finished products and products for industrial uses such as milk powder, cheese, processed nuts, and other ingredients. The FTA offers great opportunities to sell U.S. ingredients in Morocco. Although local processors have improved and diversified significantly their production over the past few years, the range of products they are putting on the market is still very small and is unlikely to fulfill all the demand. The local producers are becoming more quality-conscious; U.S. suppliers can play a major role in fulfilling the demand for regular quality products. Most food processors purchase their ingredients from well-established importers or from local agents of multinationals. Very few large processors purchase their ingredients directly from exporters abroad. Thus, U.S. exporters are advised to go through local suppliers of ingredients to be able to use their distribution network. The local industry is committed to develop further in the future to withstand stiffer competition. Many local producers (biscuit plants, confectioneries, canneries, etc.) have started offering a new range of products to maintain their market share and compete with imported products.

High Value Products for Hotels, Restaurants, and Institutional (HRI):

In 2010, Morocco received about 9.3 million visitors, mostly tourists from Europe but also from the United States, and about 4.4 millions Moroccans leaving oversea. The GOM's ambitious plan to reach 10 million tourists by 2010 was achieved by more than 90 percent though the current global economic slowdown. Recently, the GOM launched a revision of this plan aiming to reach 20 million tourists by 2020. However, large modern hotels are still popping up throughout the country, which is expected to boost the demand for food packaged for services. In addition, the annual (July-August) visit of about 4 million expatriate based in Europe boosts consumption significantly, especially in the tourism sector.

Although there are over 718 graded hotels in Morocco, the potential market for U.S. consumer-oriented products consists essentially of some 60 upscale hotels (5 stars) concentrated mostly in Agadir, Marrakech, Casablanca, Rabat, and Fes, about 38 tourist villages and clubs, and over 149 hotels graded as 4 stars. Other hotels target lower income customers and don't offer regularly imported food and beverages to their clients. Most hotels purchase their food products from local distributors that are also

in some cases importers. U.S. suppliers should try to work with these distributors to enter this market, as hotels and hotel chains managements are rarely willing to get involved in import operations because of the small volume involved.

Categorized Moroccan, Asian, Western-style and other specialty restaurants, in Morocco are estimated to about 409 units. Restaurants categorization is mandatory as stipulated by the law 61-00 that regulates touristic establishment status. These restaurants do or may potentially use imported products on a regular basis. Most of these restaurants buy directly from local distributors/importers because of the low volume involved. U.S. exporters are strongly encouraged to go through the established importers that have their own sales forces.

Export of Seafood Products to Morocco:

Although Morocco is a net exporter of fish products over \$600 million, there is a window for some U.S. seafood products especially since under FTA most fish products will be exonerated from customs duties. The demand should come mostly from the upper class hotels and restaurants located in major cities. The per capita consumption of fish is low in Morocco and consists mostly of fresh low-priced pelagic species such as sardines. Inadequate distribution channels have been a major limiting factor to increased fish consumption. Thus, few importers have appropriate facilities and refrigerated trucks to supply frozen food to supermarkets. Also, few supermarkets have equipment to handle and exhibit frozen or refrigerated fish. It is estimated that less than 40 percent of Moroccan families have refrigerators at home.

New exporters are advised to work closely with already established frozen food importers that are also distributors in order to use their distribution network and experience. The volume of seafood used by hotels and restaurants remains relatively small and thus it is still more beneficial for them to purchase from local distributors. U.S. suppliers can work closely with the local distributor to carry on promotional activities in selected hotels, restaurants, and supermarkets.

Fast Food - Franchising:

American fast food outlets have been some of the most successful businesses in Morocco in recent years. For example, McDonald's, Pizza Hut, Domino's Pizza, Kentucky Fried Chicken, TGI Friday's have all opened during the past 10 years. More outlets are scheduled to open in the near future in response to the higher demand for quality, "Western type" food. The rapid growth in the sector stems from major economic changes in Morocco, including economic growth, higher disposable income, and the increased number of women working outside homes. The development of U.S. fast food outlets in Morocco has resulted in an increase of imports of food ingredients, including from the United States, which the local industry is unable to provide on a regular basis. The US-FTA will increase this opportunity since many food ingredients (cheese, chicken nuggets,) have significant preferential access

to the Moroccan market.

SECTION IV: BEST HIGH VALUE PRODUCT PROSPECTS

The Morocco-US FTA has provisions by which duties levied against U.S. agricultural products will eventually be phased out for most agricultural products. For many products, the preferential access will be significant enough to warrant increased trade in the medium term.

Dairy Products: skimmed milk, butter, cheese, and whey including for food processors and HRI. Butter currently exempted from import duty from all origins.

Milk Powder 60%, Whey 17.5%, and Cheese 75%. Significant tariff cuts for U.S. cheese. Whey from U.S. is duty free. Exports from the U.S. soared in 2010 to over \$60 million.

Fresh Apples and Pears: Provision for 2,433 MT duty free quotas under U.S. Morocco FTA. Quota opens Feb.1-May 31. First Come – First Serve

Dry Fruits and Nuts: Between 2009 and 2010 import of: dried raisins ranged from 10,900 MT to 2,870 MT, Prunes stable at 500 MT; Almonds from 816 MT to 669 MT. Prune import depends on local crop. Imports duties are 50 to 53.5%. Under the FTA U.S. has duty free access for pistachios/ pecan seed. For other nuts duties go down in 8 to 10 years. 60.8 tons plus duty free almonds quota.

Beef: Morocco's imports in 2010 are estimated at 1,612 MT mostly hamburger patties. No beef cuts have been imported (prohibitive tariffs). About 4,000 MT, of beef carcasses for military mostly from Argentina. (Duty free from all origins). The U.S. beef quota under the FTA has not been yet utilized due to the lack of an approved import health certificate that is currently undergoing negotiation between USDA/APHIS and the Moroccan Vet Services.

Poultry: Morocco's imports in 2010 are estimated at 2,600 MT of de-boned, frozen, turkey meat from Europe (Belgium). Tariff rate of imports is 124 % ad valorem. U.S. has a quota of 5,000 MT of chicken leg quarters and wings at preferential rate. The U.S. poultry meat quota under the FTA has not been yet utilized due the lack of an approved import health certificate that is currently undergoing negotiation between USDA/APHIS and the Moroccan Vet Services.

Preserved Fruits and Vegetables: Morocco's imports in 2010 soared to 43,000 MT from 28,600 MT in the previous year. Average imports tariff rate is estimated at 50%.

Pulses Eston type lentils, white kidney beans, broad beans, peas demand increase during the month of Ramadan and the winter time. The market size is estimated at 80,000MT. In 2010, Morocco imports decreased 46 percent to 21,917 MT compared to the previous year. Import duties are 50%.

Honey Peak demand during Ramadan. The market size is about 5,666 MT of which 4,000 MT produced locally and 1,666 MT imported in 2010. Average import tariff rate is about 50%.

Sauces and Condiments including for HRI. The market size is about 5,000 MT. Morocco's imports are estimated at 2,302 MT in 2010. Average import tariff rate is 50%.

SECTION V: KEY CONTACTS AND FURTHER INFORMATION

The Foreign Agriculture Service Website (FAS/USDA): www.fas.usda.gov

The Office of Agricultural Affairs at the American Embassy in Rabat provides trade servicing and information about the Moroccan market. The free service provided by this office includes providing market briefings, market tours, lists of importers, setting up agendas and meetings, hotel reservations, and in some cases providing translations and transportation.

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For Additional information of the US-Morocco FTA please visit:

<http://www.usembassy.ma/services/fas/AgFTA.htm>

Local Contacts:

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Workdays / Hours:

- Working days in Morocco are Monday through Friday.
- Morocco is on Greenwich Mean Time.
- Typically, working hours are 8:30 am -16 pm.

On Fridays (the prayer day), administration and some private companies' working hours are: 8:30-11:30 and 3:00 pm - 6:30 pm.

- Visits during August should be avoided because many businesses close for vacation.

Holidays:

Religious holidays follow the lunar calendar and thus move back 11 days every calendar year. Below are Moroccan holidays for the coming year:

Table 3: 2012 Holidays Schedules

| DATE | HOLIDAY |
|--------|--|
| 2-Jan | New Year, 2012 |
| 11-Jan | PRESENTATION OF MOROCCAN INDEPENDENCE PROCLAMATION |

| | |
|-----------------|---|
| 16-Jan | MARTIN LUTHER KING'S BIRTHDAY |
| February 5/6 | EID MAWLID AN NABBAOUI-Birthday of prophet Mohammed |
| 20-Feb | PRESIDENT'S DAY |
| May 1** | MOROCCAN LABOR DAY |
| 28-May | MEMORIAL DAY |
| 4-Jul | AMERICAN INDEPENDENCE DAY |
| July 30** | FEAST OF THE THRONE |
| | King's Mohammed VI ascension to the throne |
| August 20** | REVOLUTION OF THE KING AND THE PEOPLE |
| August 21** | YOUTH DAY-King's Mohammed VI birthday |
| Aug 20 & 21 | EID AL FITR-Celebration of end of Ramadan |
| 3-Sep | AMERICAN LABOR DAY |
| 8-October | COLUMBUS DAY |
| October 26 & 27 | EID AL ADHA- Muslims' feast of sacrifice |
| 12-Nov | VETERAN'S DAY |
| 15-Nov | FIRST MOHARRAM-Muslims' New Year |
| 18-Nov | FEAST OF INDEPENDENCE-Morocco's independence-1956 |
| 22-Nov | THANKSGIVING DAY |
| 25-Dec | CHRISTMAS DAY |

Table A: Key Trade & Demographic Information

| | | |
|--|---------------|------|
| Agricultural Imports From All Countries (\$Mil.) / U.S. Market Share (%) | 4168 | 20 |
| Consumer Food Imports From All Countries (\$Mil.)/US Market Share(%) | 525 | 13.5 |
| Edible Fishery Imports From All Countries (\$Mil.)/US Market Share (%) | 107 | <1 |
| Total Population (Millions) / Annual Growth Rate (%) | 34 | 1.06 |
| Urban Population (Millions) / Annual Growth Rate (%) | 19 | 2.1 |
| Number of Major Metropolitan Areas (a) | 11 | |
| Size of the Middle Class (b) (Millions) / Growth Rate (%) (b) | 10 | 2.0 |
| Per Capita Gross Domestic Products (\$U.S.) | \$2,835 | |
| Unemployment Rate (%) | 9.1 | |
| Per Capita Food Expenditures (\$U.S.) (C) | \$1,355 | |
| Percent of Female Population Employed | 24.2 | |
| Indicative Exchange Rate (US \$1 is :) | 8.45 dirham's | |

(a) Population in Excess of 500,000 / (b) Estimated Population than can regularly purchase imported food products.

(c) Estimates based on average population food share of 0.478; this ratio is different for the moderate poor (0.578) and the extreme poor(0.645)

There is a large variation in revenue especially between urban and rural areas and a large part of the economy unaccounted for.

Table B: Consumer Food & Edible Fishery Products Imports-2009-2010 in \$ million

| Calendar Year | Total Morocco Imports | | Imports from USA | |
|----------------------------------|-----------------------|------------|------------------|-----------|
| | 2009 | 2010 | 2009 | 2010 |
| | | | | |
| Total High Value Products | 508 | 525 | 46 | 78 |
| Milk Powder | 75 | 80 | 13 | 32 |
| Butter | 67 | 90 | 15 | 17 |
| Baby Formula | 32 | 33 | 0 | 0 |
| Frozen Beef | 33 | 24 | 0 | 0 |

| | | | | |
|------------------------------------|--------------|--------------|------------|------------|
| Other Dairy (Mixes) | 29 | 30 | 5 | 9 |
| Biscuits | 21 | 22 | 0 | 0 |
| Whisky/Vodka | 24 | 26 | 0 | 0 |
| Chocolate Bars | 14 | 13 | 0 | 0 |
| Wine | 13 | 14 | 0 | 0 |
| Cheeses | 22 | 30 | 6 | 9 |
| Chocolate, Confectionary | 11 | 11 | 0 | 0 |
| Cereal Derivatives | 7 | 7 | 0 | 0 |
| Spices Flavoring | 6 | 6 | 0 | 0 |
| Banana | 11 | 12 | 0 | 0 |
| Pasta | 8 | 8 | 0 | 0 |
| Canned Vegetables | 5 | 6 | 0 | 0 |
| Fresh Onion and Similar | 5 | 6 | 0 | 0 |
| Soft Drinks, Carbon. | 6 | 7 | 0 | 0 |
| Whey | 8 | 8 | 2 | 2 |
| Fresh Apples | 9 | 12 | 1 | 2 |
| Dried Raisins | 7 | 3 | 0 | 0 |
| Ice Cream | 4 | 1 | 0 | 0 |
| Ground Beef | 2 | 2 | 0 | 0 |
| Corn Based Cereals | 3 | 3 | | |
| Almonds | 6 | 7 | 4 | 7 |
| Sauces Seasonings | 3 | 4 | 0 | 0 |
| Pet Food | 2 | 3 | 0 | 0 |
| Orange Juice Frozen | 3 | 3 | 0 | 0 |
| Total Seafood | 69.36 | 107.8 | 0 | 0 |
| Crustaceans | 34.7 | 69.1 | 0 | 0 |
| Fish, Cured, Smoked | 4.9 | 12.2 | 0 | 0 |
| Fish Fillets, Meat | 2.4 | 8.3 | 0 | 0 |
| Mollusks | 5.9 | 7.5 | 0 | 0 |
| Fish, Frozen, Whole | 17.1 | 5.3 | 0 | 0 |
| Fish, Whole Fr/Ch | 4.0 | 4.8 | 0 | 0 |
| Live Fish | 0.3 | 0.5 | 0 | 0 |
| Agricultural Products Total | 4,035 | 4,169 | 681 | 845 |
| Agr., Fish, Forestry Total | 4,393 | 4,609 | 683 | 847 |

Note: Indicative Exchange Rate (\$/dh) 2009:8.1/2010:8.45

Source: Moroccan Customs Data (Office des Changes)

Table C: Top 15 Suppliers of Consumer Food & Edible Fishery Products

Morocco Imports (Millions of Dollars)

| Consumer Oriented Products Import by Country of Origin | | | | Seafood Imports by Country of Origin | | | |
|---|------------|------------|------------|---|-------------|-------------|--------------|
| COUNTRY | 2008 | 2009 | 2010 | COUNTRY | 2008 | 2009 | 2010 |
| Total Imports | 533 | 508 | 525 | Total Imports | 44.2 | 69.4 | 107.8 |
| France | 146.6 | 89.4 | 141.1 | Netherlands | 9.6 | 18.0 | 46.1 |
| United States | 57.3 | 46 | 78 | Argentina | 4.7 | 4.6 | 11.0 |

| | | | | | | | |
|------------------|------|------|------|----------------------|-----|------|-----|
| Brazil | 27.9 | 33.5 | 46.1 | China | 2.7 | 3.3 | 9.2 |
| Argentina | 71.1 | 25.9 | 42.0 | Denmark | 1.7 | 4.9 | 6.4 |
| Canada | 39.5 | 61.9 | 32.5 | Spain | 7.3 | 11.6 | 5.7 |
| China | 17.4 | 29.4 | 29.0 | Belgium | 3.3 | 5.0 | 5.7 |
| Netherlands | 14.3 | 18.8 | 21.4 | Norway | 2.8 | 3.9 | 5.0 |
| Germany | 22.1 | 13.4 | 19.1 | Ecuador | 0.0 | 0.2 | 2.5 |
| Spain | 14.6 | 16.3 | 15.4 | Vietnam | 0.6 | 0.9 | 2.4 |
| Tunisia | 8.2 | 10.5 | 12.1 | Sweden | 0.8 | 1.3 | 1.9 |
| New Zealand | 6.4 | 7.8 | 10.8 | Thailand | 0.1 | 0.9 | 1.9 |
| Egypt | 3.2 | 11.6 | 7.7 | United Arab Emirates | 0.3 | 1.0 | 1.5 |
| United Kingdom | 6.9 | 6.4 | 6.9 | Canada | 0.9 | 1.6 | 1.0 |
| Australia | 2.4 | 8.1 | 6.7 | Croatia | 0.0 | 0.5 | 1.0 |
| Paraguay | 4.5 | 9.3 | 5.8 | Others Suppliers | 9.4 | 11.7 | 6.4 |
| Belgium | 4.0 | 6.3 | 4.9 | | | | |
| Ukraine | 3.1 | 16.9 | 4.0 | | | | |
| Italy | 2.8 | 3.6 | 3.9 | | | | |
| Vietnam | 3.1 | 5.2 | 3.6 | | | | |
| Indonesia | 2.7 | 4.2 | 3.5 | | | | |
| Sweden | 9.2 | 1.0 | 3.0 | | | | |
| Denmark | 4.1 | 2.7 | 2.8 | | | | |
| Poland | 1.5 | 2.0 | 2.7 | | | | |
| Others Suppliers | 59.8 | 77.8 | 37.6 | | | | |

Source: Moroccan Customs Data (Office des Changes)